



Carleton
University

Sprett
School of Business

BUSI 4304A
Procurement and Contracting
Winter 2026

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Office hours: online or in my office by appointment

Zoom meeting ID: 641 589 5727

Course meets: Wednesday, 11:35PM -14:25 PM In Person

COURSE MATERIALS:

Robert M. Monczka, Robert B. Handfield, Larry C. Giunipero, and James L. Patterson, 2020, Purchasing and Supply Chain Management. (7th Edition). Cengage South-Western, Mason, OH. (ISBN: electronic copy: 9780357710890) (optional) \$77.95

PREREQUISITES:

Third-year standing; BUSI 2301 with a C grade or higher.

COURSE CALENDAR DESCRIPTION:

Core supply chain procurement processes in the private and public sectors involved in the acquisition of goods and services, including sourcing, purchasing, contracting, supplier collaboration and relationship development and management. Emphasis on concepts, principles, practices, and techniques.

COURSE OBJECTIVE

The course addresses core supply chain procurement processes in the private and public sectors involved in the acquisition of goods and services, including sourcing, purchasing,



contracting, supplier collaboration and relationship development and management. Emphasis on concepts, principles, practices, and techniques.

LEARNING GOAL

After successfully completing this course, you will be able to:

CO1. Articulate core concepts, principles, and practices of purchasing department in private organizations and government agencies.

CO2. Apply relevant decision-making tools and techniques to develop purchasing policy and procedures.

CO3. Analyze relevant information and make strategic and tactical purchasing decisions by assessing competing priorities and trade-offs.

CO4. Analyze supply base, select appropriate suppliers, and manage supply relationship.

CO5. Navigate and oversee various stages of the purchasing process.

CLASS CONDUCT

The class time will be taken up by lecturing from the course instructor as well as case studies, exercises, and games. Much of the time will be devoted to the discussion of concepts, cases, and problems. You are expected not only to attend class, but also to be prepared to discuss the problems and exercises on the day assigned. Be sure to bring a laptop, and your textbook to class with you at all times.

MARKS ALLOCATIONS: credit for the course will be based on the evaluation items outlined below.

<u>Evaluation Item</u>	<u>Mark</u>
Class participation	5
In-class test	15
Group Case write-up	10
Challenger	5
Group presentation and response to comment	10
Purchasing policy exercise	5

Supply chain negotiation game	5
Individual case analysis (due on April 23, 2026)	45
Total	100

CLASS PARTICIPATION

The instructor will give multiple choice, short answer, and the calculation questions during lecture. Each time the students submit answer through Socrative, the student will receive one class participation point (regardless the correctness of the answer). For the Patio Swings exercise, an answer submitted by a group is counted as one participation point for all the group members. The students need to receive at least 70% of the participation points in order to get full participation mark (5% of the total grade). For example, if the instructor gives 50 questions throughout the semester, the students need to answer $50 \times 70\% = 35$ questions in order to get full participation mark.

PARTICIPATION BONUS

The instructor assigns bonus points to the participation. The students will get 1 bonus point each time for answering the short answer questions. For multiple choice and the calculation questions, the students who submit right answer through socrative will receive 1 bonus point.

1 bonus point is equivalent to 0.25% of individual case report. You can use the bonus points to add a Maximum of 5% to your individual case report mark.

IN-CLASS TEST

There will be one in-class test that cover material related to pricing.

IN-CLASS EXERCISE

There will be three in-class exercises: (1) developing purchasing policy; (2) product and sales data analysis; and (3) Patio Swings Intermodal Shipping. Students need to bring laptop computers to class for the exercise (1) and (2), and calculator(or laptop computer) for exercise (3). For the product and sales data analysis, students need to have Excel installed on their computer.

SUPPLY CHAIN NEGOTIATION GAME

The supply chain negotiation game is a role-playing game where the retailer and wholesaler roles are assigned to student groups. The groups negotiate supply contracts in a number of rounds



during a class period. Each group makes pricing, inventory, and ordering decision concurrently, and competes with others to achieve the highest profit.

THE CASE METHOD

Teams will be assigned at the beginning of the semester and these teams will remain throughout the semester. Each team will be responsible for presenting assigned cases to the class. The members of non-presenting teams need to actively participate in the class discussion.

Case write-up

To prepare for the case presentations, the team needs to become the "expert" on your assigned case study. As a group, you should prepare a case write-up. The expected length of the write-up is 5-10 pages (in addition to any exhibits). It should be single-spaced, with normal margins and *Times New Roman 12 font*. The cover page should include the names of team members, name of the case, date, and title of the case. While the format of the write-up may vary depending on the nature of the cases, it normally includes (1) A statement of core problems or issues of the case; (2) Analysis of key challenges facing the focal company. And (3) Your recommendation as to which actions should be taken and timeline of your actions.

To assist the team to write the write-up, the instructor offers several assignment questions for each case. **The team needs to answer these questions in the case write-up.**

The team may book an appointment with the instructor before the case presentation. The instructor will help the team to verify their ideas and answer any questions that may arise when the team prepare for the case presentation.

The team needs to upload a draft of case write-up to Google drive, under the folder “case write-up”, two days before your presentation (for example, if the presentation date is on Tuesday, you need to submit the draft on Sunday). The file needs to be a Word document (docx). Do not submit your file in pdf format.

After the case presentation, the instructor will meet with the team to discuss how to improve the write-up. **The final version of case write-up is due one week after the presentation.**

You will be evaluated based on the quality of your initial submission, as well as the improvement you make after receiving comment from the instructor (40%/60%).

Examples of case write-ups could be found on Culearn.

You may also want to refer to the book “The case study handbook: how to read, discuss, and write persuasively about cases” (Author William Ellet). The book is available at library at Floor 2 as Circulation Desk Reserve, with call number [HD30.4 .E435 2007](#). The chapter 10-12 of the book are especially helpful for preparing the case write-up.

According to Professor Doug Allen at University of Denver¹, some common shortcomings in write-ups include:

1. Restating the facts or copying the case material verbatim.
2. A wandering discussion that lacks direction. The use of headings often helps provide structure to your argument. Be specific as to issue, alternatives, and recommendations.
3. Failure to make a decision when the case calls for one. Choose a position and build an argument for it, even if you can see that another position also has merit.
4. Poor spelling, grammar or incomprehensible writing. The effectiveness of your communication can, in this class and in the business world, make an important difference in selling your ideas.

The case write-up will be evaluated based on the following criteria:

Clear explanation of key problems facing the firm	20%
Appropriate analysis for assignment questions	35%
Appropriate conclusion and recommendations	25%
Writing (Proper organization, professional writing, and logical flow of analysis)	20%

Case presentation

Your team needs to prepare a powerpoint file to be presented to the class. Specifically, your team needs to explain the case to the class, assuming the class is "top managers" and you are middle managers that reporting the current situation to them. The presentation should includes

1. Summary of the backgrounds and key facts of the company
2. The key points of your case write-up

The presentation should be around 20-30 minutes. The presentation will be evaluated based on the following criteria:

Visual design of the sliders	10%
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¹ www.daniels.du.edu/degrees/syllabi/MGMT4240.doc

Quality of ideas/solutions	25%
Appropriate organization of information on sliders	15%
Appropriate organization of verbal presentation	15%
Speaking style/delivery	20%
Appropriate response to comments	15%

Case comments

For each presentation, a non-presenting teams will be designated as the Challenger. The Challenger team should provide a 5-10 minutes comments on the presentation. The comment may challenge the presenting team's analysis or recommendation, demand additional explanation from the team, or offer recommendation. The presenting team has also 5-10 minutes to respond to each comment.

Each of the remaining teams is also required to submit two questions related to the presentation. The questions need to be submitted through Google drive, before the challenging team making their comments. After the challenging team finish, we will review the questions submitted by the remaining teams. The presenting team need to answer any question not covered by the challenging team.

There is no additional mark for the remaining teams' questions. However, the team members will lose 3 participation points if the team does not submit the questions each time.

Case comments will be evaluated based on the relevance and importance of the issue raised, and/or quality of recommendation.

PEER REVIEW FOR TEAMWORK

We will conduct peer reviews for purchasing policy exercise and case study. Each individual will evaluate his or her teammates based on the following criteria: 5=Very substantial contribution; 4=Substantial contribution; 3=Average contribution; 2=Little contribution; 1=No contribution at all.

Any individual who receive an average peer review score less than 2.5 will see his/her score on the teamwork reduced by 20%. (If a team consists of only two individuals, the person who gives the other a score less than 3 may be requested to provide evidence).

Please keep evidence of your contribution (e.g., Original file of your input) to the teamwork.

The instructor reserves the right to further reduce an individual's teamwork score if his or her teammates present strong evidence of free riding.

INDIVIDUAL CASE STUDY

There will be one case (Boeing's Strategic Initiative: Raw Material Supply Chain Risk Mitigation, case number: W58C01) assigned to the class for students to analyze it individually. Each student needs to independently write a case report for this case to address the assigned discussion questions. The requirements for this case report are the same as those for the group case write-up.

MAKE-UP TEST/EXERCISE/CASE DISCUSSION

Make-up test (without penalty to the grade) will be allowed only if you cannot attend a class and provide the instructor with a university-sanctioned excuse for your absence.

A quiz/test/ midterm deferral will be held on a Monday, at 7:15 am. A specific date will be shared in class and on Brightspace.

For class exercise and case presentation, the student needs to provide the instructor with a university-sanctioned excuse for your absence *before the class*. The weights of the marks will be transferred to other evaluation items. Failure to notify the instructor before the class will result in the loss of the participation mark.

COURSE SCHEDULE: The following is a general outline of material to be covered during the semester.

Note: the schedule is subject to changes in response to progress and opportunities that may arise in a given semester. Therefore it is imperative for you to attend class and be aware of new developments in the course that may affect the due dates of assignments or scheduling of tests.

	Chapter	Case ¹ /exercise	Requirement
2026/1/7	Introduction/ Chapter 2-purchasing process		
2026/1/14	Chapter 3-Purchasing Policy and Procedures	Exercise-Sprott purchasing policy	Laptop computer
2026/1/21	Chapter 6- Category Strategy Development	Exercise-product and sales data analysis	Laptop computer with Excel installed
2026/1/28	Chapter 11-Strategic Cost Management/Pricing (Slider could be found on Culearn)		
2026/2/4	Chapter 7-Supplier Evaluation and Selection	Exercise-Reverse auction game	Laptop computer
2026/2/11	Chapter 13-Negotiation and Conflict Management/ In-class exam on pricing		
2026/2/18	Winter break		
2026/2/25		Exercise-Supply chain negotiation game	Laptop computer
2026/3/4	Chapter 8- Supplier Quality Management	Case-Agile electric: quality issues in a global supply chain (9B12D011)	
2026/3/11	Chapter 10-Worldwide Sourcing	Case- Tariff Shock: Sustainable Sneaker Start-Up Okepas Battles a Broken Supply Chain (206SMU-PDF-ENG) (available from Harvard Business Publishing)	Calculator or laptop computer

2026/3/18	Chapter 19- Performance Measurement and Evaluation.	Case- MODMASK: Starting Up in a Pandemic (SCG-581)	
2026/3/25	Chapter14- Contract Management.	Case- Value-Based Contracting and Blue Cross Blue Shield of Massachusetts (A04-24-0007)	
2026/4/1	Chapter 17-Purchasing Services.	Case- Fintech: Choosing a Cloud Services Provider (NAC3724)	

Note:

1. Cases could be purchased from Ivey School of Business's web site:
<https://www.iveycases.com/>; except for "Tariff Shock: Sustainable Sneaker Start-Up Okepas Battles a Broken Supply Chain" (available from Harvard Business Publishing: <https://hbsp.harvard.edu/cases/>).
2. The number in parentheses is the case reference number

Policies & Accommodations

<https://students.carleton.ca/course-outline/>

<https://carleton.ca/pmc/current-students/academic-accommodations/>



Stay updated with important notifications and announcements from Carleton University, by downloading the Carleton University App!

Contribution to Learning Goals of the Program ([BCom](#), [BIB](#)):

Program Learning Goal	Competencies Not Covered	Competencies Introduced (only)	Competencies Taught But Not Assessed	Competencies Taught and Assessed
CHECK (X) ONE PER ROW				
BC1 Knowledge <i>Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.</i>				X
BC2 Collaboration <i>Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.</i>				X
BC3 Critical Thinking <i>Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases and assumptions, and draw conclusions based on analysis and evaluation.</i>				X
BC4 Communication <i>Graduates will be effective and persuasive in their communications.</i>				X
BI5 Global Awareness (BIB ONLY) <i>Graduates will be globally-minded.</i>				

ADDITIONAL INFORMATION

Course Sharing Websites

Materials created for this course (including presentations and posted notes, labs, case studies, assignments, and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

Required calculator in BUSI course examinations.

If you are purchasing a calculator, we recommend anyone of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

Group work

The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership, and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Grading

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

A+ = 90-100	B+ = 77-79	C+ = 67-69	D+ = 57-59
A = 85-89	B = 73-76	C = 63-66	D = 53-56
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52

F = Below 50

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

Academic Regulations

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>

Requests for Academic Accommodation

Carleton is committed to providing academic accessibility for all individuals. You may need special arrangements to meet your academic obligations during the term. The accommodation request processes, including information about the *Academic Consideration Policy for Students in Medical and Other Extenuating Circumstances*, are outlined on the Academic Accommodations website (students.carleton.ca/course-outline).